

Recommender/Mentor Instructions for Uploading a Confidential Letter

You have received a request from an applicant to the Burroughs Wellcome Fund (BWF) to provide a letter of recommendation for their BWF grant application. Providing this letter is crucial to the applicant's proposal and is carefully reviewed the BWF Advisory Committee. BWF appreciates your willingness to serve in this capacity. All letters must be uploaded to the BWF Grant Tracker system, so that your letter may be automatically "connected" with the applicant's proposal.

Recommendation letters are CONFIDENTIAL. The applicant can view the status of the letter on the system – i.e., whether or not it has been successfully uploaded – but cannot view the contents of the letter. If additional information is requested from you, such as basic contact information or certification of the applicant's eligibility, the applicant will be able to view these details.

As a recommender or mentor, you should have received the following:

- An email requesting the letter and providing a link to upload the letter.
- If you do not have an account on BWF Grant Tracker, you should have also received a separate email to establish an account.

STEP ONE: Generating the Letter

Complete the letter using any standard word processing software. BWF requires the letter be on official institutional letterhead, with a signature block. The letter may be uploaded as a Word document or as a PDF. Save the letter on your computer or network.

STEP TWO: Creating an account on BWF Grant Tracker (if you already have an account, then you may skip to STEP THREE)

If you do not have an account on BWF Grant Tracker, you will need to establish one. Most likely you do not have an account, since this system is newly implemented at BWF. This account may be used for future BWF activities and you will not need to re-establish the account for this email address. Only one account can be created per email address.

To create the account, the recommender/mentor should have received an email from the Grant Tracker system to set up your account (it was likely the first email you received from the system). You will receive a separate email to upload the letter. To confirm your account:

1. Click on the link in the email. The email subject should be “BWF Grant Tracker Account”

Your account for the Burroughs Wellcome Fund Grant Application System has now been created. Please use the following link to create your password:

<https://bwf-test.ccgranttracker.com/Login/Reset/L6EK6UFPJVP2LKE9GB2B9721R2>

If you did not request this account be created, it is likely that you have been added to a BWF grant application to provide a letter of recommendation or serve as a partner. Please look for a second email from the system with more information. Your account must be established within 24 hours of receiving this email.

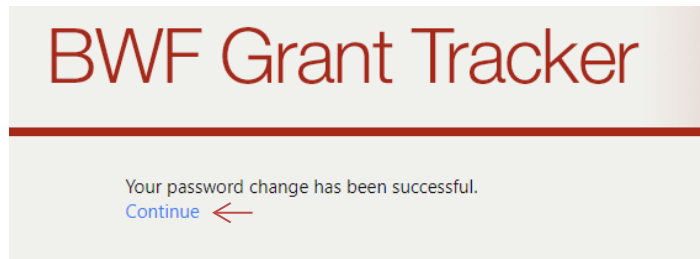
2. Create a password for your account. Note the parameters for a new password. Click the *Change* button to save the password. (**Remember your password – you will need it later!**)

Please enter a new password.
New password must be a minimum of 8 characters, and must contain any 3 of the following: numbers, uppercase characters, lowercase characters, or special characters.

Password

Confirm Password


3. Click *Continue*.



4. Review the Terms and Conditions and *click the box*, indicating acceptance. Click *Next*.

Terms and Conditions

Before you can log in, please read and accept our terms and conditions below.

 [Terms and Conditions of Use](#) | accept ←

5. Complete the following form. Last name and organization will be required.

It is also recommended you complete the following fields, since they will be required when you submit your letter (First Name, Last Name, Job Title, Department, Address, Organization, and Telephone). ORCID ID and Areas of Expertise are not required.

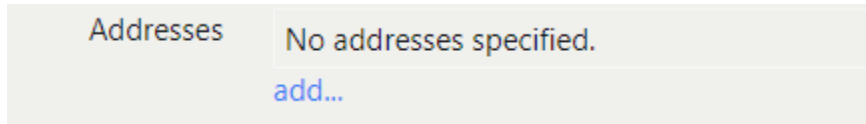
Click **Save** when done.

Please complete the following form.

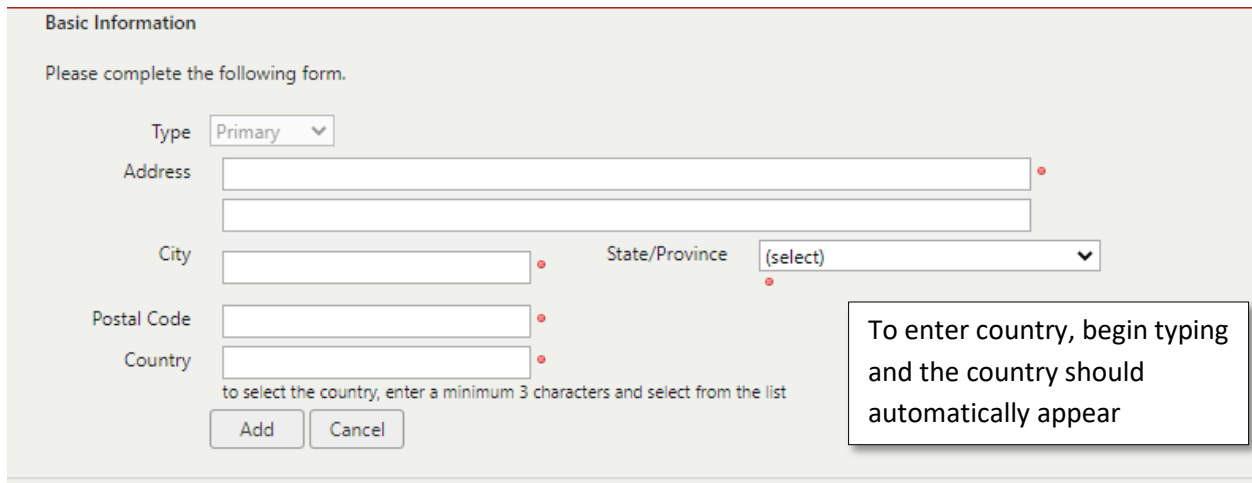
Prefix	<input type="text" value="(select)"/>					
First Name	<input type="text" value="First Name"/>	←				
Middle name / initial	<input type="text"/>					
Last Name	<input type="text" value="Last Name"/>	←				
Suffix	<input type="text" value="(select)"/>	←				
Organization	<input type="text"/>	←				
	To select your organization, begin typing its name and select from the list. If your organization is not available in the dropdown list, continue typing the full organization name and click Save. BWF will validate the organization once your request is submitted.					
Department	<input type="text"/>	←				
Job Title	<input type="text"/>	←				
Academic Rank	<input type="text" value="(select)"/>					
Doctoral Degree	<input type="text" value="(select)"/>					
Addresses	No addresses specified. add...	← Click to add your office address				
Telephone	<input type="text"/>	←				
Extension	<input type="text"/>					
Mobile	<input type="text"/>					
Additional Emails	<table border="1"><thead><tr><th>Type</th><th>Email</th></tr></thead><tbody><tr><td colspan="2">add...</td></tr></tbody></table>	Type	Email	add...		
Type	Email					
add...						
ORCID ID	<input type="text"/>	add ORCID or register with ORCID				
	ORCID Authorisation Date: ----					
Areas of Expertise	Choose Classifications No Classifications found.	ORCID and Areas of Expertise are not required				

Tips for adding your organization: Begin typing the organization name in the drop-down list. The name of your organization should automatically populate. If your organization is not listed, try a university you may be affiliated with.

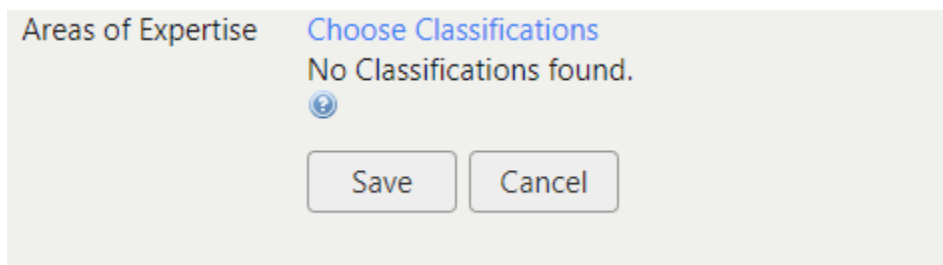
Tips for adding the address: To add the address, click the blue *add address link* on the basic information form.



The pop-up below will appear. Click *Add* when the required fields have been completed.

A screenshot of a "Basic Information" form. The form title is "Basic Information" and it asks the user to "Please complete the following form." The form contains several fields: "Type" (a dropdown menu set to "Primary"), "Address" (two stacked text input fields), "City" (a text input field), "State/Province" (a dropdown menu set to "(select)"), "Postal Code" (a text input field), and "Country" (a text input field). Below the "Country" field, there is a small instruction: "to select the country, enter a minimum 3 characters and select from the list". At the bottom of the form are "Add" and "Cancel" buttons. A callout box on the right side of the form contains the text: "To enter country, begin typing and the country should automatically appear".

6. Click **Save** when done. Remember your password (you will need it later)! You may logout of the system on the left-hand panel.

A screenshot of a user interface element. On the left, the text "Areas of Expertise" is displayed in a light blue font. To its right, a light gray box contains the text "Choose Classifications" in a blue font, followed by "No Classifications found." in a dark gray font. Below this text is a small blue question mark icon. At the bottom of the box are "Save" and "Cancel" buttons.

STEP THREE: Uploaded your letter

1. Access the email from ccgrantracker.co.uk with the subject line “Added as Postdoc Mentor for Burroughs Wellcome Fund grant application reference”
2. *Click on the link* provided in the email. You will be taken to the login page, where you may enter your email and password. Next, you will be directed to the following page that will indicate the applicant’s name and project title. Your role on the project will be listed. Confirm this is indeed the person that for whom you wish to submit a letter . Click the *EDIT* button in the top right handcorner to add your letter.

The screenshot shows the 'BWF Grant Tracker' interface. At the top left is the Burroughs Wellcome Fund logo. The user is logged in as 'Dr. Melanie Scott-Test1345'. The main content area displays application details for 'Mrs. Melanie Scott-Test-MS' with reference '3531'. A red box highlights the 'Postdoc Mentor' role and the 'Edit' button. Another red box points to the applicant's name 'Dr. Melanie Scott-Test1345' in the participants list, with the text 'Recommend or Postdoc Mentor appears here'.

Lead Applicant	Mrs. Melanie Scott-Test-MS
Title	CASI Test Project title - 6-30-2020
Reference	3531
Status	Pre-Submission
Institution	Career Awards at the Scientific Interface
Grant Type	Career Awards at the Scientific Interface
Funding Round	CASI Pre-Proposal
Closing Date	Friday, July 31, 2020 at 3:00 PM ET
Participants	<u>Postdoc Mentor</u> Dr. Melanie Scott-Test1345
Created On	Tuesday, June 30, 2020
Last Updated	Monday, July 6, 2020
Validated	Not Complete
Applicant Submitted	
Submitted On	

3. You will be directed to a page where you can enter your information and upload the letter. To complete basic contact information: Click the *Basic Information* link. It will open a new tab where you can enter your details (for required fields see Section I). Click *Save* when you are done. The Primary Recommendation Letter should still be opened in the previous tab.

The screenshot shows the 'Primary Mentor Recommendation Letter' form. It includes a navigation bar with 'Cancel', 'Previous', 'Next', 'Save', and 'Save And Close' buttons. The form contains a message about mandatory fields and a link to 'Basic Information'. Below is a form with the following details:

Prefix	Mrs.	Primary Institution	
First Name	Melanie	Email	scottmb1345@gmail.com
Middle Name		Telephone	919/991-5107
Last Name	Scott-Test1345	Extension	
Suffix	D.V.M.	Degree	D.V.M.
Address	PO Box 13901	North Carolina	27709 United States of America

4. Mentors may be required to complete a certification box indicating their willingness to serve as a mentor and the eligibility requirements.

The screenshot shows a web form titled "Primary Mentor Recommendation Letter". At the top right are buttons for "Cancel", "Previous", "Next", "Save", and "Save And Close". Below the title is a message: "Please check your details below. Fields marked with a red dot are mandatory. To update your Contact details, click on the [Basic Information](#) link. This will open a new tab where you can update and save your details. Return to this tab and **Save** or **refresh the page** to see your changes." Below this is a form with the following fields:

Prefix	Mrs.	Primary Institution	
First Name	Melanie	Email	scottmb1345@gmail.com
Middle Name		Telephone	919/991-5107
Last Name	Scott-Test1345	Extension	
Suffix	D.V.M.	Degree	D.V.M.
Address	PO Box 13901	North Carolina	27709 United States of America

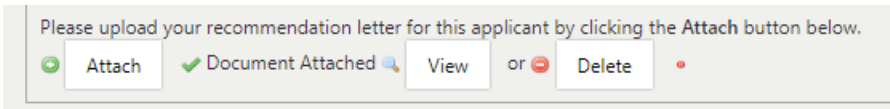
Below the contact information is a section titled "Certification and Recommendation". It contains the following text: "Please upload the applicant's recommendation letter and certify that: 1) you will serve as their mentor and 2) that the applicant meets the eligibility requirements outlined in the RFP ([click here](#)). The recommendation letter can be uploaded as a word document or a PDF. The applicant will not have access to your letter." Below this are two certification checkboxes, both checked and marked with a red dot: "I certify that I am willing to serve as mentor for the postdoc portion of this award" and "I certify that the applicant meets the eligibility requirements for this award". Below the checkboxes is the text: "Please upload your recommendation letter for this applicant by clicking the Attach button below." At the bottom of the form are buttons for "Attach", "Document Attached", "View", "Delete", and "or".

Callouts in red boxes provide instructions: "To update the contact information displayed, click the blue link. A contact information page should open in a new tab in the browser. Complete the required fields with a red dot. Click Save when done." (pointing to the "Basic Information" link); "Certify that you are willing to serve as a mentor and that the applicant meets the eligibility requirements" (pointing to the certification checkboxes); and "Attach the letter of recommendation here" (pointing to the "Attach" button).

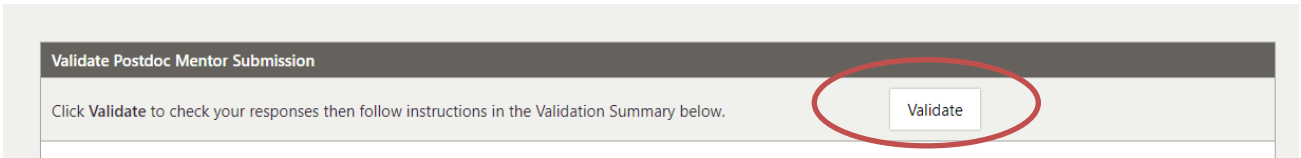
5. Upload your letter of recommendation by attaching the letter. Click the *Choose file* button and search for the file. Locate the file. Click *Attach*.

The screenshot shows a file upload dialog box titled "Upload Recommendation Letter". It contains a "Choose File" button and the text "No file chosen". Below the dialog is an "Attach" button. Both the "Choose File" button and the "Attach" button are circled in red.

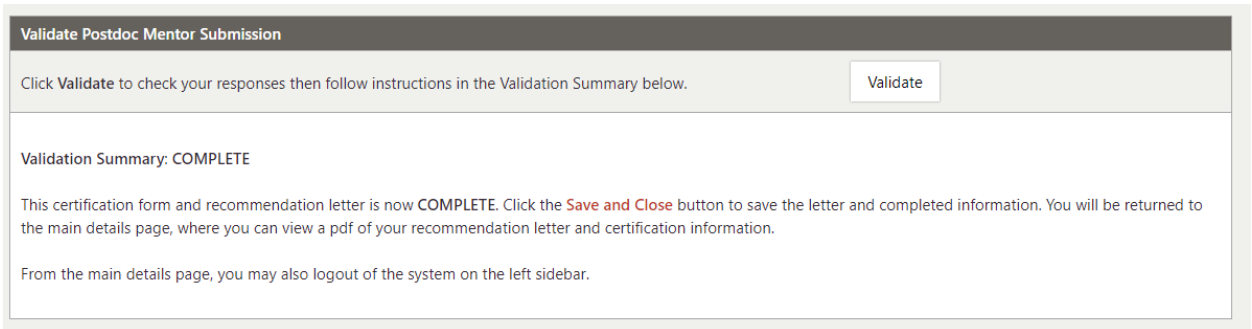
6. You may see the indicator indication the letter has been attached.



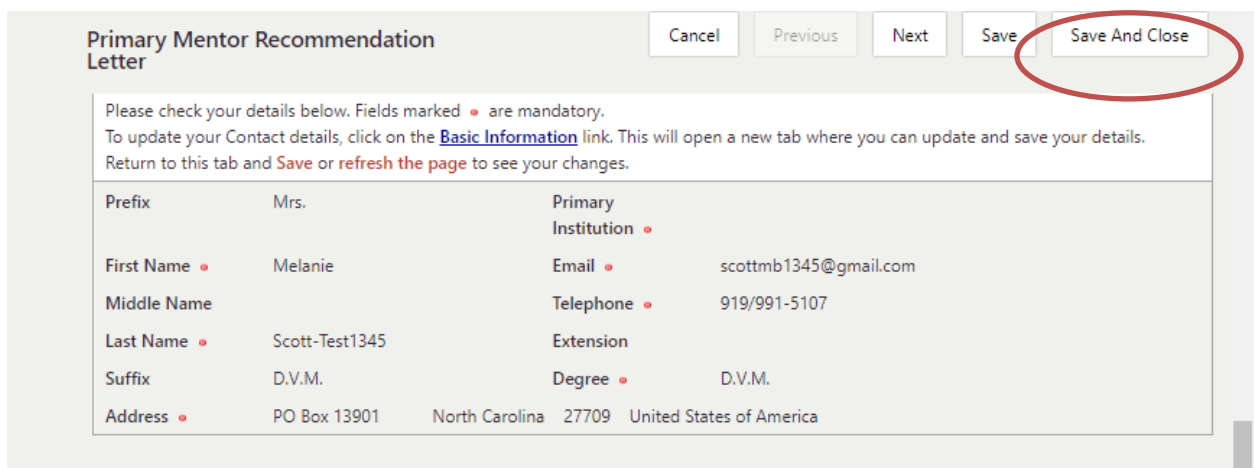
7. Click **Validate** at the bottom of the screen to Validate that all requested fields are complete:



8. The following validation message should appear if all the information was completed. If information is incomplete, scroll up to the form and complete the requested information.



9. Once the form is complete, click *Save and Close*.



10. After you hit save and close, you will be returned to the home page for the application letter submission. You can edit the letter if needed or print a PDF of the letter. You may *Logout* when you are done.

The screenshot shows a web application interface for a grant submission. The interface is divided into three main sections:

- Left Sidebar (Navigation):** Contains links for Home, My Applications, My Co-applications, Career Awards at the Scientific Interface (Ref: 3531), Details, View History, Journal (0), Sign-off Status, My Research Outputs, Manage My Details, Contact Us, Logout (circled in red), and System Help.
- Central Details Panel:** Displays application information for 'CASI Test Project title - 6-30-2020'. Fields include Reference (3531), Status (Pre-Submission), Institution (Career Awards at the Scientific Interface), Grant Type (Career Awards at the Scientific Interface), Funding Round (CASI Pre-Proposal), Closing Date (Friday, July 31, 2020 at 3:00 PM ET), Participants (Postdoc Mentor, Dr. Melanie Scott-Test1345), Created On (Tuesday, June 30, 2020), Last Updated (Monday, July 6, 2020), Validated (Not Complete), and Applicant Submitted (Submitted On).
- Right Sidebar (Actions):** Contains a note for Postdoc Mentors, an 'Edit the application' section with an 'Edit' button, and a 'PDF the application (Print)' section with a 'View/Print' button (circled in red). The PDF section includes instructions on how to handle browser download issues and a link for 'PDF Formatting Problems?'.

Forgotten Passwords

If you have forgotten your password, you may access the BWF Grant Tracker portal site through your email link or at the portal homepage:

<https://bwfund.ccgrantracker.com/Login.aspx?ReturnUrl=%2fPortal>

1. Click the *Forgot Password* link:

BWF Grant Tracker

The Burroughs Wellcome Fund is an independent private foundation dedicated to advancing the biomedical sciences by educational activities. To achieve this mission, BWF primarily supports the career development of young scientists and education activities in North Carolina.

BWF Grant Tracker enables you to apply for, and manage, BWF grants through the online portal. Please note that any ap need to create a new account due to the implementation of a new system. If you experience issues, please contact us.

Existing Users
Please log in to access your account.

Email

Password

[Forgot Password?](#)

New users
Please register here to create your new BWF institutional/work email address

[System Help](#)

2. A pop-up window will appear. Enter the email address that you used for your account. Click *Submit*.

Please enter your email address and we will send you an email with instructions to reset your password.

Email

⚠ Please enter your email.

3. A link will be emailed to you to change your password. Click the link in the email message and change your password. Click *Change*.

Please enter a new password.
New password must be a minimum of 8 characters, and must contain any 3 of the following: numbers, uppercase characters, lowercase characters, or special characters.

Password

Confirm Password